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Use of County Tax Rolls for the Creation of Mailing Lists for Extension Programming

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Abstract: The Extension forestry programs at Mississippi State and Cornell use county tax rolls for developing county landowner mailing lists. The use of these mailing lists, when combined with traditional past program attendee mailing lists, has increased the visibility and activities of both programs by reaching out to a larger clientele base, including underserved landowners.

Introduction

Contacting prospective clientele about upcoming and ongoing Extension programs is one of the most important and sometimes difficult activities facing Extension professionals. There is abundant evidence, especially for forest landowners, that the potential audience changes regularly (Butler & Leatherberry, 2004) and that many are outside the normal channels reached through Cooperative Extension programs. Current methods of marketing Extension events may not reach audiences who lack a traditional connection to Extension programs.

Existing mailing lists developed from past program participants are commonly used; however, the clientele served are typically those already reached through programming. While this works and provides the needed program numbers and contacts, it leaves one "preaching to the choir." It can be challenging and somewhat

risky to try to expand the clientele base. Further, while some programs attempt to significantly change the ability of a client to perform a specific task, other program objectives seek a less dramatic behavior of simply being aware of educational resources or management philosophies.

The Extension forestry programs at Mississippi State University and Cornell University Cooperative Extension in New York have developed a way to expand the number of potential clients reached for any given program and to deliver targeted content information on specific subjects. This method uses mailing lists developed from county tax rolls. We describe the methods used to obtain and manipulate these lists and identify problems and pitfalls associated with their use.

Forest Landowner Diversity

Forest landowners are a large and diverse clientele group that can challenge the traditional Extension model for connecting to the client. In any given state, there are comparatively small numbers of cattle/dairy producers, cotton growers, or apple producers. In contrast, forest landowners are a large audience and lack the centralized commodity focus of other audiences. In Mississippi and New York, there over 300,000 and 400,000 forest landowners, respectively, all of whom are potential clients for forestry and natural resources Extension programming.

Many agricultural commodity groups have a common production focus and annual revenue to encourage their connection with Extension. Forest owners all own forests but have potentially divergent and sometimes conflicting interests. For example, national surveys document the reasons why people own forest land, including aesthetics, land investment, timber production, hunting, and nature preservation (Birch, 1996). The variety of ownership objectives increases the complexity of reaching a group that lacks a common bond other than being forest-land owners. Other natural resources topics would also be appealing to these landowners, including wildlife and water resources.

Most of the Extension programming done by forestry Extension at Mississippi State University is with the county forestry associations in conjunction with the county Extension offices (Londo & Monaghan, 2002). These associations represent approximately 8,000 landowners, or 2% of all forest landowners in the state. In New York, the forestry Extension program works through both the county-based offices of Cornell Cooperative Extension and through groups such as the New York Forest Owners Association. These partnerships have developed client relationships that, optimistically, reach 1% of the private forest owners and 5% of the private forest land with a reasonable likelihood for changed behavior.

Existing efforts to market programs leave a large number of potential clientele for our programs. In order to reach more of these potential clientele, including underserved and minority landowners (Hughes et al., 2005), county tax rolls began to be used for mailing of Extension educational programming announcements.

Obtaining and Correcting the Tax Roles

Individual county tax rolls are provided by the county tax assessor's office or through a centralized, state-level office that accumulates county-level data. Initially, these lists in Mississippi were provided for research purposes; however, arrangements have been made with the county tax assessors as well as researchers at Mississippi State to use these rolls for educational purposes as well.

The tax rolls include all property owners in the county. In order to be used to reach forest landowners, the tax rolls need to be corrected. This correction process includes removing duplicates, as some people who own multiple properties will be listed more than once. Also, there will be slight differences in names, with one

property listed under landowners with similar names.

The quality of the data varies among counties. While many counties have updated their databases to reflect the change to new county-wide emergency addresses, other counties have not. Also, some counties use data recording methods that are supplemental or ancillary to the data submitted to the state. This in turn creates different types of information in the tax rolls and necessitates sorting for consistency of data to ensure that addresses are compatible with US Postal Service standards for mailing.

The property classification code associated with each property owner allows for a more comprehensive gathering of data. In New York and Mississippi, property class codes distinguish different land uses, including agricultural use, residential and vacant rural lands, vacation lands, and forest lands. The property class code is applied to the entire parcel, at the discretion of the assessor, and may not reflect the dominant land use, but rather the historic or most active land use. The practice varies by county. By deliberate combinations of acreage thresholds and property class code, property owners likely to possess forest land are included. For example, a 20-acre parcel designated as hay and forage crops (check actual code labels) might not have forest associated with it, but a 50-acre parcel of the same land use almost certainly would.

Use of the Tax Rolls

Once the rolls have been corrected, they can be easily used for mailings. Typically, these lists are sorted such that all landowners controlling property within a range, or minimum of acres of forest land receive announcements for a given program. The cut-off acreage is based on the total number of landowners in the county, as well as funds available for mailing.

Mailing costs increase dramatically with the use of county tax lists for a number reasons. First, more program announcements are sent, thus increasing costs. Second, even though mailings can be done at a discounted bulk rate, if returns are requested, these cost the full first class postage rate. We have learned through experience that the addresses in the tax rolls are not always right and that if we want to maintain an accurate database, returns are necessary to correct the lists.

Because of mailing costs, one strategy is to use the tax rolls to target medium-sized forest owners, in the 35- to 100-acre range, because of their likely responsiveness to programs and the impact possible through these larger parcels. This strategy assumes that other marketing techniques used are adequate to reach smaller and larger landowners. Smaller parcel owners, because they are more numerous, are most efficiently reached through advertisements in local newspapers and poster displays at community locations. The larger landowners may already use a professional forester and gain little from programming or can be reached through announcements in landowner association newsletters. Owners of large landholdings are relatively few in number and can be included with relatively minor increases in mailing costs.

A second strategy is to plan for a mailing to announce multiple events and to also encourage landowners to access web sites for calendars and registration information. A 2006 mailing in New York encouraged landowners to work with a brochure to assess their level of management awareness and to visit the program Web site or call their local Extension office to learn about educational programs. This particular mailing included an envelope stuffed with the brochure and a letter. The added cost of materials and labor for stuffing was warranted based on previous trials of mailing brochures alone versus mailing within a university embossed envelope. The latter seemed to attract more attention and resulted in landowners retaining the brochure for a longer period of time.

For state level Extension programs, an additional person would likely need to be hired to maintain the lists. This would allow the secretary and specialists the freedom to do their regular jobs. At the county level, a

county Extension office can likely maintain their one mailing list.

Do Tax Roll Mailings Reach Forest Owners?

A number of lines of evidence support the value in mass mailing via tax rolls to deliver a message to forest owners. This evidence is weighed against the costs as described above.

First, following an ice storm in the northeastern US and adjacent Canada in 1998, a direct mailing with a brochure and letter was sent to 5,000 forest owners known, by tax rolls, to have property in the affected area. One year later, the owners receiving the mailing were surveyed to assess their perspective on educational and technical assistance following the ice storm. Approximately 10% of the forest owners recalled receiving the brochure 1 year after the mailing (Connelly & Smallidge, 2003). This is in contrast to commercial direct mail marketing, where 1% to 3% is considered successful (Attard, 2000;). However, in some community-scale mailings, success rates can exceed 10% (Southern Ontario Library Service, 2001). Success in direct mailing depends on correctly identifying the market, delivering an effective message, and using a mailing list that can be screened for people in the market sector you target (Attard, 2000).

Second, direct tax roll mailings were used between 1997 and 1999 to announce a series of urban-area workshops in four population centers throughout New York. There was no other deliberate marketing effort for these workshops. One workshop in one city resulted in approximately 100 participants in 2 consecutive years, but other workshops typically resulted in 150 to 200 or more participants. Participants were surveyed before they left the workshop to determine if they had previously attended a Cornell Cooperative Extension event, and on average more than 80% had not previously attended.

Third, it is difficult to quantify the people who retained the brochure and made some behavior change as a result of it. Even people invited to a workshop but who do not attend have the potential to improve their awareness and perception of the services provided by Cooperative Extension. In response to the 1998 ice storm direct mailing described above, the brochure header stated "Call Before You Cut," and as much as 6 years after the mailing people have called and specifically referenced this brochure. That brochure was, incidentally, replicated in several other northeastern states.

Fourth, there were people who, anecdotally, indicated a change in their business activity as a result of a direct mailing. One group was agency service providers through Cooperative Extension or the state forestry agency that reported as much as a 25% increase in calls for assistance following a statewide brochure mailing. The second group were loggers who were interested in working directly with forest owners and didn't want the owners seeking professional assistance. One logger complained to a county Extension agent that the brochure "Call Before You Cut" would hurt his business.

Fifth, the use of county tax rolls for mailing Extension forestry programming announcements has increased the awareness of the public of the Extension forestry programs in both Mississippi and New York. Mississippi, for example, sends out approximately 100,000 mailings a year to landowners across the state about programs. Without the use of the county tax rolls, the total mailings would be approximately 4,000, or about 4% of what is done presently. While the actual benefits of this increased awareness are difficult to quantify, the potential benefits are huge in terms of constituent support, increasing public awareness of the Extension forestry and natural resources programs, and the potential for reaching new clientele across the state.

Conclusions

County tax rolls can be effectively used for creating landowner mailing lists for Extension programming at the state and county level. These lists will enable an Extension program to increase the visibility of the program by increasing the number of clientele and potential clientele, including underserved and minority landowners, contacted through direct mail efforts.

These tax rolls need to be "corrected" prior to their use for mailings. County residents owning multiple ownerships, misspellings, and 911 addresses need to be accounted for prior to use. Mailing costs will increase through the use of the tax rolls, especially if returned mail is requested to keep the database updated. For state-level programs, it is likely that an additional person will have to be hired to maintain the mailing lists. County level personnel can likely handle their own mailing lists.

The effectiveness of tax-roll-based direct mailings will depend on correct identification of the market audience, developing a good message, and screening the mailing list to match the audience with the message. Most land-grant universities have communication or marketing departments with specialists who can help develop and refine a direct mail campaign.

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